

We are currently updating our site; thank you for your patience.

CONTRACT

CONTRACTS - EDIT

Contracts give you the ability to effectively manage your customer billing.

Contracts can only be edited when in the **New** or **Active** states.

If certain amendments are done on an Active contract, it will move back to **Released** state, to be checked and **re-approved**.

An email will be sent to all users who have the rights to authorise (i.e. <u>Release</u> and <u>Approve</u>) a contract.

The types of changes that would trigger the contract to be placed back into the **Released** state include:

- Change Contract Type
- Change Customer
- Aggregate Billing flag
- If any contract item is added
- If any contract item is removed
- If any contract item fee is added
- If any contract item fee is removed
- Change of Billing Customer on a fee
- Change of Billing Customer on a meter

And if the following types of changes are made to the Contract Item Fees:

- Amount
- Start Date
- End Date



- Escalation %
- Account Code
- COS Account Code
- Invoice Description
- Billing Period
- Billing Cycle
- Finance Party
- Finance Amount

Note: As you can only edit a contract in the **Active** or **New** status - the contract you wish to edit will either be in this state or the New State.

Ribbon Select Contract > Contracts



The Contract Listing screen will be displayed.

Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

Upon opening, this screen will default to the **Active** status, listing all the **Active** contracts for the selected site.



Contracts - Edit

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SELECT THE CONTRACT

• Select the **row** of the **contract** that you wish to process.

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• Click on the **Edit** button.



Contracts - Edit

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The **Contract Maintenance** screen will be displayed.

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EDIT CONTRACT DETAILS

- The Maintenance for Contract No. : [] Status: [] screen will open.
- Edit the details, as required.



- Expand the **Information tabs** on the left-hand side of the screen, if those frames contain details that need to be changed.
- Expand the **Items data grids**, if there are details there, which need to be changed.

SAVE CHANGES

SAVE THE CONTRACT

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• When you are done, click on **Save**.

- The contract will be saved and you will return to the Contract Listing screen where the status defaults to Active, or will be set to the Status you last selected.
- Click on the **drop-down arrow** in the **Status** field and select the relevant status.

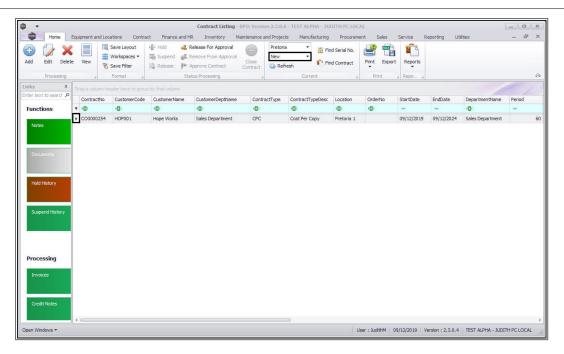


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- New contracts can be found within the New contract status listing screen.
- From here, the contract will need to be **Released** and then **Approved** before it becomes active.
- Edited contracts may either remain in Active status or move to Released status in order for changes to be reviewed before Approval depending on the change made.



Contracts - Edit



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